

# Forbes | SHOOK

# NEXT-GEN

# SUMMIT

Sunday,  
October 02, 2022

Monday,  
October 03, 2022

TIME	SESSION & SPEAKER
12:00pm	Registration Opens at Detroit Opera House
4:30-6:30pm	Pre-Party Hosted by First Trust at the Frankel Lounge in Detroit Opera House
7:00pm	Musical Performance at Detroit Opera House
8:00 – 9:00am	Breakfast
9:00 - 9:10am	Opening Remarks — <b>R.J. Shook</b> , Co-Founder & President, SHOOK Research, Senior Forbes Contributor
9:10 - 9:15am	SHOOK One's - My Best Idea — <b>Annemarie von der Goltz</b> , J.P. Morgan Wealth Management
9:15 - 9:35am	Active Models for Active Markets — <b>Theodore Dimig</b> , Managing Director, Head of Advisory and Core Beta Solutions, J.P. Morgan Asset Management — <b>Brandon Ritter</b> , Executive Director & Client Advisor, J.P. Morgan Asset Management
9:35 - 9:55am	Fastest Growing NG's — <b>Drew Rosenfeld</b> , Merrill Lynch Wealth Management — <b>Amy Li</b> , Morgan Stanley Wealth Management — <b>Moderator: Steve Samuels</b> , Managing Director, Merrill Lynch Wealth Management
9:55 - 10:20am	Generating Referrals Through Centers of Influence — <b>Brian Gallary</b> , Head of Strategy & Consulting, First Trust Portfolios L.P.
10:20 - 10:30am	SHOOK One's - My Best Idea — <b>Nick LoMaglio</b> , UBS Wealth Management
10:30 - 10:50am	Compensating and Motivating Team Members — <b>Matt Gallo</b> , Merrill Lynch Wealth Management — <b>Amit Grover</b> , Morgan Stanley Wealth Management — <b>Moderator: Ken Correa</b> , Managing Director, National Business Development Executive, Merrill Lynch Wealth Management
10:50 - 11:15am	Protecting Your Assets and Information in the Digital Age — <b>Rachel Wilson</b> , Head of Wealth Management Data Security & Infrastructure Risk, Morgan Stanley Wealth Management
11:15 – 11:30am	Refreshments/transition to roundtables
11:30am - 12:10pm	Roundtables
12:10 - 12:25pm	Transition to Lunch
12:25 - 1:25pm	Lunch – Food Trucks
1:25 - 1:40pm	Transition Back to SHOOK

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## TIME

## SESSION & SPEAKER

1:40 - 2:00pm	<b>Forbes/SHOOK NG Spotlight: Service Abroad, Serving at Home</b> — <b>Corey Mazza</b> , UBS Wealth Management — <b>Moderator: Heather Crist</b> , Head of Field Engagement, UBS Wealth Management USA
2:00 - 2:20pm	<b>Building the Team of the Future...</b> — <b>Andrew Billingham</b> , Merrill Lynch Wealth Management — <b>Brent Barnhart</b> , UBS Private Wealth Management — <b>Moderator: Heather Hunt-Ruddy</b> , Head of National Sales, Wells Fargo Advisors
2:20 - 2:25pm	<b>SHOOK One's - My Best Idea</b> — <b>David Papale</b> , Wells Fargo Advisors
2:25 - 2:45pm	<b>Economic Overview</b> — <b>Strider Elass</b> , Sr. Economist, First Trust Portfolios L.P.
2:45 - 3:20pm	<b>SHOOK Best Idea Competition</b> — <b>Judge: Heather Hunt-Ruddy</b> , Head of National Sales, Wells Fargo Advisors — <b>Judge: Heather Crist</b> , Head of Field Engagement, UBS Wealth Management USA — <b>Judge: Ken Correa</b> , Managing Director, National Business Development Executive, Merrill Lynch Wealth Management — <b>Moderator: Frank Berland</b> , Managing Partner, SHOOK Research — <b>Moderator: Liz Shook</b> , COO & CO-Founder, SHOOK Research
3:20 - 3:30pm	<b>Closing Remarks</b> — <b>Frank Berland</b> , Managing Partner, SHOOK Research
3:00-5:00pm	<b>Forbes Afternoon Programming</b>
8pm-12am	<b>Bar Crawl</b> <b>Participating Bars</b> — The Brakeman — Queens Bar — The Skip — Tin Roof
9:00 - 10:00am	<b>Breakfast</b>
10:00 - 10:10am	<b>Welcome Remarks</b> — <b>Lindsey Nacht</b> , Senior AVP, Research Manager, SHOOK Research
10:10 - 10:30am	<b>Model Portfolios That Stand Out From The Rest</b> — <b>Amy Moroz</b> , Investment Specialist, J.P. Morgan Asset Management Multi-Asset Solutions — <b>Kevin Voorhees</b> , Model Portfolio Specialist, J.P. Morgan Asset Management

Tuesday,  
October 04, 2022

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# NEXT-GEN

## SUMMIT

Tuesday,  
October 04, 2022

TIME	SESSION & SPEAKER
10:30 - 10:55am	<b>Building Elite Financial Teams</b> <ul style="list-style-type: none"> <li>— <b>Jack Mullen</b>, Merrill Private Wealth Management</li> <li>— <b>Alexander Pugatch</b>, Morgan Stanley Wealth Management</li> <li>— <b>Moderator: Jim Cotchett</b>, Director of National Accounts, First Eagle Investments</li> </ul>
10:55 - 11:15am	<b>Team Structure and Delegation</b> <ul style="list-style-type: none"> <li>— <b>Lizzie Decarlo</b>, UBS Wealth Management</li> <li>— <b>Cody Hilbun</b>, Raymond James &amp; Associates</li> <li>— <b>Moderator: Kevin Adams</b>, Head of Field Development &amp; Productivity, UBS Wealth Management</li> </ul>
11:15 - 11:35am	<b>Building a World-Class Team</b> <ul style="list-style-type: none"> <li>— <b>Joseph McLister</b>, Morgan Stanley Wealth Management</li> <li>— <b>Kaitlyn Cruse</b>, Merrill Lynch Wealth Management</li> <li>— <b>Moderator: Brandon Ritter</b>, Executive Director &amp; Client Advisor, J.P. Morgan Asset Management</li> </ul>
11:35 - 11:50am	<b>Refreshments</b>
11:50am - 12:05pm	<b>Team Efficiency</b> <ul style="list-style-type: none"> <li>— <b>Alvin Spencer</b>, Stifel</li> <li>— <b>Josh Glass</b>, Stifel</li> <li>— <b>Tom Kotcher</b>, Managing Director, First Trust Portfolios L.P.</li> </ul>
12:05 - 12:25pm	<b>Transformational Conversations: Blueprints from America's Top Advisor Teams</b> <ul style="list-style-type: none"> <li>— <b>Chris Brady</b>, Regional Vice President, Pacific Life</li> </ul>
12:25 - 12:30pm	<b>The Last Word</b> <ul style="list-style-type: none"> <li>— <b>Frank Berland</b>, Managing Partner, SHOOK Research</li> </ul>